

Client Needs Assessment

CHECKLIST

Use the following checklist to evaluate areas that you would like to improve.

- Financial Stress
- Values
- Strength
- Advancement
- Transition Career
- Satisfaction
- Toleration
- Self-Abuse
- Communication
- Identification
- Awareness
- Professionalism
- Creativity
- Legacy
- Generosity
- Management
- Boundaries
- Compassion
- Integrity
- Confidence
- Effort
- Selfishness
- Harmony
- Development

- Character
- Empathy
- Fear
- Simplification
- Flexibility
- Methodology
- Revenue Growth
- Value for Others
- Teamwork
- Negotiation
- Vision
- Innovation
- Evolution
- Relationships
- Sense of Purpose
- Salary
- Personal Life Plan
- Obstacles
- Spiritual
- Time Management
- Technical Skills
- Decision Making
- Structure
- Spouse
- Resolutions
- Organization
- Fulfillment
- Quality
- Reputation
- Culture
- Leadership
- Performance

*Visionary Ventures
Consulting LLC*